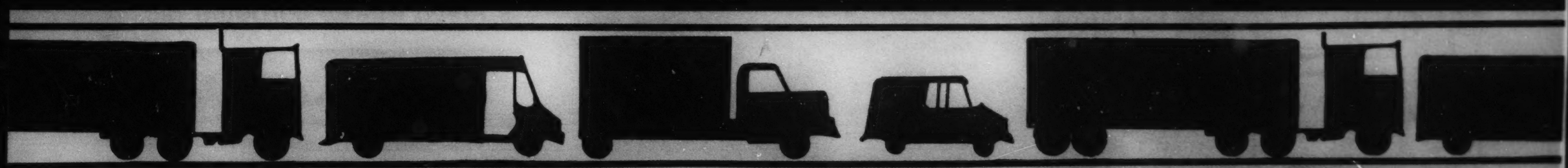
A0900-2F 4/86

No. 2

Bakery Fleet Transportation Survey

Based on data compiled by the American Bakers Association.



UCBCo

BAKING equipment

Class 3A: Companies with 51-150 vehicles
(28 baking companies)
2,644 vehicles in total

Vehicle	Total	Company owned	Full-service Lease	Lessor take-back
Cars	296	234	1	61
Trucks	1,610	1,468	142	—
Tractors	320	213	67	40
Trailers	418	381	20	17

Vehicle	Engine type			
	Gasoline	Diesel	Propane	CNG
Walk-in/route van[1]	789	68	57	—
Walk-in/route van[2]	396	74	136	—
Walk-in/route van[3]	17	4	—	—
Medium truck[4]	18	6	—	—
Medium truck[5]	17	24	—	—
Heavy truck[6]	—	4	—	—
Medium tractor[7]	18	186	5	—
Heavy tractor[8]	—	111	—	—

Vehicles converted	Diesel repowered	Propane converted	CNG converted
Walk-in/route van[1]	32	57	—
Walk-in/route van[2]	21	131	—
Walk-in/route van[3]	4	—	—
Medium truck[4]	—	—	—
Medium truck[5]	—	—	—
Heavy truck[6]	—	—	—
Medium tractor[7]	—	—	—
Heavy tractor[8]	—	—	—

Vehicle age	<5 years	5-10 years	10-15 years	>15 years
Walk-in/route van[1]	311	267	244	92
Walk-in/route van[2]	151	231	172	52
Walk-in/route van[3]	10	—	—	11
Medium truck[4]	6	15	2	1
Medium truck[5]	6	6	17	12
Heavy truck[6]	4	—	—	—
Medium tractor[7]	93	78	34	4
Heavy tractor[8]	80	19	12	—
Single-axle trailer	81	49	28	7
Tandem-axle trailer	62	53	32	2
Reefer	49	46	—	—
Dry bulk & other	—	5	2	2

Vehicle	Average miles driven	Number stops	Top speed mph	Local : Highway
Walk-in/route van[1]	19,857	30	53	65 : 35
Walk-in/route van[2]	24,450	28	55	60 : 40
Walk-in/route van[3]	35,667	27	48	58 : 42
Medium truck[4]	12,749	7	56	71 : 29
Medium truck[5]	24,660	21	65	55 : 45
Heavy truck[6]	61,333	13	60	55 : 45
Medium tractor[7]	64,114	7	56	6 : 94
Heavy tractor[8]	81,510	4	55	10 : 90

Vehicle	Chassis life weighted avg. years	Body life weighted avg. years
Walk-in/route van[1]	11.5	16.0
Walk-in/route van[2]	17.1	17.1
Walk-in/route van[3]	16.6	15.5
Medium truck[4]	8.6	
Medium truck[5]	11.6	
Heavy truck[6]	6.0	
Medium tractor[7]	9.7	
Heavy tractor[8]	8.2	
Single-axle trailer	11.3	
Tandem-axle trailer	14.9	
Reefer	6.8	
Dry bulk & other	11.7	

References: [1]<10,000 lb GVW. [2]10,001-15,000 lb GVW. [3]15,001-19,500 lb GVW. [4]19,501-26,000 lb GVW. [5]26,001-33,000 lb GVW. [6]>30,000 lb GVW. [7]<50,000 lb GCW. [8]>50,000 lb GCW.

Class 3B: Companies with <50 vehicles
(32 baking companies)
898 vehicles in total

Vehicle	Total	Company owned	Full-service Lease	Lessor take-back
Cars	165	118	21	26
Trucks	393	342	40	11
Tractors	136	57	78	1
Trailers	204	131	72	1

Vehicle	Engine type			
	Gasoline	Diesel	Propane	CNG
Walk-in/route van[1]	283	8	14	—
Walk-in/route van[2]	49	1	5	—
Walk-in/route van[3]	3	—	—	—
Medium truck[4]	3	7	—	—
Medium truck[5]	—	20	—	—
Heavy truck[6]	—	—	—	—
Medium tractor[7]	22	61	—	—
Heavy tractor[8]	3	50	—	—

Vehicles converted	Diesel repowered	Propane converted	CNG converted
Walk-in/route van[1]	—	22	—
Walk-in/route van[2]	1	5	—
Walk-in/route van[3]	—	—	—
Medium truck[4]	—	—	—
Medium truck[5]	1	—	—
Heavy truck[6]	1	—	—
Medium tractor[7]	3	—	—
Heavy tractor[8]	—	—	—

Vehicle	Average miles driven	Number stops	Top speed mph	Local : Highway
Walk-in/route van[1]	21,854	29	55	56 : 44
Walk-in/route van2	18,249	24	55	29 : 71
Walk-in/route van[3]	10,417	22	55	20 : 80
Medium truck[4]	39,245	7	56	30 : 70
Medium truck[5]	59,333	2	57	5 : 95
Heavy truck[6]	—	—	—	—
Medium tractor[7]	53,789	9	56	26 : 74
Heavy tractor[8]	78,750	6	61	20 : 80

Vehicle age	<5 years	5-10 years	10-15 years	>15 years
Walk-in/route van[1]	61	141	62	41
Walk-in/route van[2]	17	36	2	—
Walk-in/route van[3]	3	—	—	—
Medium truck[4]	10	—	—	—
Medium truck[5]	9	7	3	1
Heavy truck[6]	—	—	—	—
Medium tractor[7]	56	16	10	1
Heavy tractor[8]	47	4	2	—
Single-axle trailer	1	14	7	1
Tandem-axle trailer	34	96	11	—
Reefer	25	2	10	—
Dry bulk	—	1	2	—

Vehicle	Chassis life weighted avg. years	Body life weighted avg. years
Walk-in/route van[1]	14.9	14.0
Walk-in/route van[2]	10.4	14.2
Walk-in/route van[3]	—	11.0
Medium truck[4]	8.5	
Medium truck[5]	6.7	
Heavy truck[6]	—	
Medium tractor[7]	11.4	
Heavy tractor[8]	4.9	
Single-axle trailer	14.2	
Tandem-axle trailer	12.2	
Reefer	7.7	
Dry bulk	19.0	

References: [1]<10,000 lb GVW. [2]10,001-15,000 lb GVW. [3]15,001-19,500 lb GVW. [4]19,501-26,000 lb GVW. [5]26,001-33,000 lb GVW. [6]>30,000 lb GVW. [7]<50,000 lb GCW. [8]>50,000 lb GCW.

Bakery fleets altering fuel choices and truck sizes as modernization proceeds

Diesel emerges as the baker's alternate fuel, while radial tires increase in use. New trucks are longer and heavier.

What's happened in the past year among bakery fleets? According to the 1984 Bakery Fleet Transportation Survey just completed by the American Bakers Association, when the baker thinks alternate fuels, he thinks diesel. Another well-defined trend is that new walk-in/route vans will be somewhat longer and heavier than those making up the current fleet. There's data here suggesting that the average age of route trucks is decreasing, due to fleet modernization efforts. And deregulation of trucking is beginning to offer bakers, the operators of some of the largest private fleets in the country, interesting new profit opportunities.

The 1984 Bakery Fleet Transportation Survey, prepared by the Fleet Executives Committee of the American Bakers Association, is again exclusively presented by *Baking Equipment* and Union City Body Co. (The first ABA fleet census was published in Dec. 13, 1983, *Baking Equipment*, pp. BE-29 to BE-40.)

Although fewer baking companies (51, as opposed to 94) participated in the 1984 survey, the number of trucks covered is only 9% lower: 36,198 this year; 39,741 last year. The proportional distribution among types of vehicles, as reported in **Table 1,** is virtually identical. Data-gathering methodology, supervised by Ira Dorfman, ABA staff liason with the Fleet Executives Committee, involved not only an extensive census form—40 pages in length—but also encompassed telephone survey work to make sure major bakers were contacted and included here.

This year, 12 fleets of 500 or more vehicles (Fleet A) rather than 1983's 15 are reported. Among companies in Fleet B size (151 to 499 vehicles), 12 companies participated in 1984, while 19 did in 1983. Fleet C, those operating up to 150 vehicles, accounted for 27 companies this year, 60 last year.

Last year some bakers of considerable size reported fleets that survey managers found much smaller than expected. The reason, they speculated, must involve use of independent distributors. And, indeed, this proved true. Asking about such "outside" fleets, the 1984 census revealed 2,707 route trucks owned and operated by independent distributors. This accounts for 8% of all walk-in/route vans and 6% of the total baking fleet.

Number of	1984	1983
Vehicles (total)	44,359	48,169
Trucks	36,198	39,741
Bakeries (total)	51	94
Fleet A bakers (500+ vehicles)	12	15
Fleet B bakers (151-499 vehicles)	12	19
Fleet C bakers (50-151 vehicles)	27	60

Altogether, the 1984 Bakery Fleet Transportation Survey sampled roughly 30% of the industry's fleet, estimated at some 140,000 vehicles, according to the ABA. In an effort to get the maximum number of vehicles into the census, survey managers made special efforts to include the major bakers, especially those operating 500 or more vehicles. Indeed, this study includes 12 such companies.

Longer, heavier walk-ins. Among walk-in/route vans, three trends are very evident in just the one year since this census was last taken:

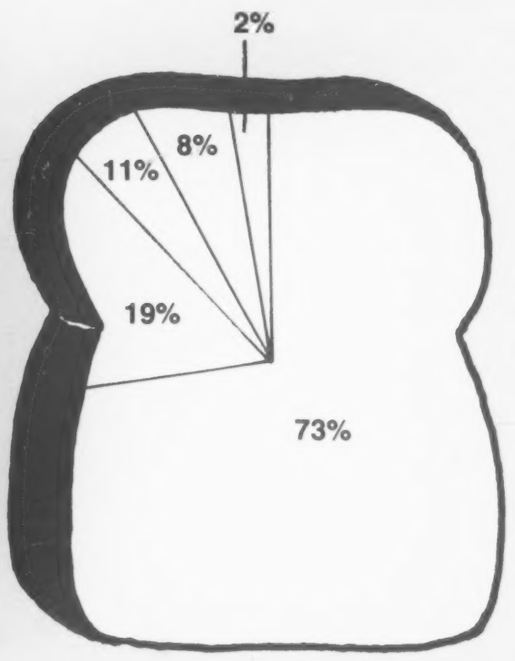
- Delivery vehicles are becoming longer.
- And heavier.
- And increasingly powered by diesel fuel.

Asked about the length of future walk-in/route vans to be purchased, half of the companies answering—20 of 41—said that they foresaw longer lengths. Altogether, they plan to order slightly more than 1,000 new route truck chassis and nearly 1,000 new route truck bodies during the next 12 months.

Tables 2 and 3 show how bakers are making different choices for their new vehicles, compared to what comprises

Table 1: **Number of Vehicles all baking companies participating**

	1984 Units	1983 Units
Walk-in/route van		
10,000 lb GVW or less	23,444	27,313
10,001-15,000 lb GVW	8,466	7,532
15,001-19,500 lb GVW	255	281
Subtotal route trucks	**32,165**	**35,126**
Medium trucks (straight trucks)		
19,501-26,000 lb GVW	475	496
26,001-33,000 lb GVW	208	445
over 33,000 lb GVW	20	
Subtotal straight trucks	**703**	**941**
Tractors		
Medium, 2-axle 50,000 lb GCW or less	2,694	2,989
Heavy, 3-axle Over 50,000 lb GCW	636	685
Subtotal tractors	**3,330**	**3,674**
Subtotal trucks	**36,198**	**39,741**
Cars	**3,359**	**3,415**
Trailers	**4,802**	**5,013**
Total vehicles (total fleet)	**44,359**	**48,169**
Number of companies	**51**	**94**



73% Walk-in/route vans
2% Medium trucks (straight trucks)
19% Tractors

8% Cars
11% Trailers

Key: percentages in parentheses indicate subcategory shares.

Table 2: **Changing van sizes of walk-in/route vans**

	Current fleet	New orders	
Under 12 ft	7%	16%	79% of current walk-in/route vans are 14 ft or under, yet 22% of new orders are this size.
12 ft	10%	—	
13-14 ft	62%	6%	
(14 ft and under)	(79%)	(22%)	
15-16 ft	19%	52%	21% of current walk-in/route vans are 15 ft or over, yet 77% of new orders are this size.
>16 ft	2%	25%	
(15 ft and over)	(21%)	(77%)	

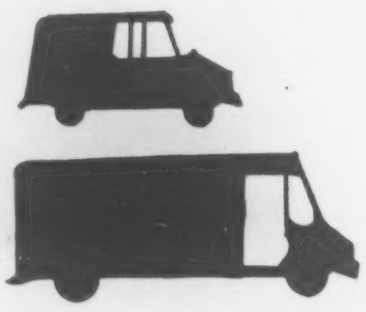
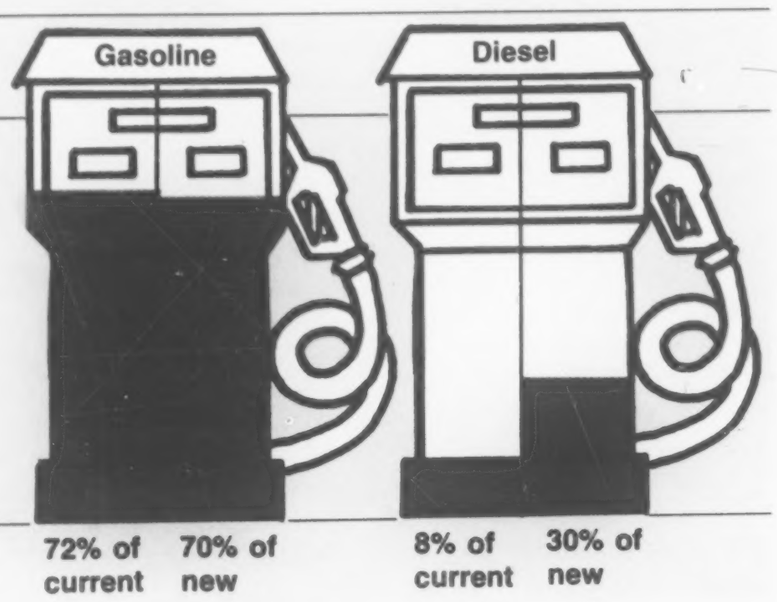


Table 3: **Changing fuel choices of walk-in/route vans**

	Current fleet	New orders
Under 10,000 lb GVW vans	73%	55%
Fueled by gasoline	72%	70%
by diesel	8%	30%
by propane	20%	—
by CNG and electric	<1%	—
10,000-15,000 lb GVW vans	26%	45%
Fueled by gasoline	59%	48%
by diesel	41%	52%



their current fleet. Besides the changes in length and fuel, these new walk-in/route vans are increasingly heavier than current units:

Walk-in/route van weight	Current fleet	New orders
Under 10,000 lb GVW	73%	55%
10,000 to 15,000 lb GVW	26%	45%

Of the 15 new straight trucks planned to be purchased during the next 12 months, only two will be gasoline powered and none will use propane or compressed natural gas as their fuels. All 203 of the new tractor purchases will be diesel powered.

Diesel: the alternate fuel. Gasoline has been the baker's fuel of choice ever since powered vehicles replaced the horse-drawn delivery wagon. The industry weathered one crisis in gasoline availability during the Arab Oil Embargo in the late 1970s. Today it faces another.

The industry's preference for leaded gasoline as a delivery fuel poses a future problem in availability, especially for urban baking operations. The air pollution effects of leaded gasoline has been linked by health professionals with lead poisoning and brain damage. In September 1984, Chicago banned leaded gasoline. This action affects only retail (consumer) sales of leaded gasoline and has not yet been echoed by other municipalities. In a more significant development, the Environmental Protection Agency presently has pending a proposal to phase out leaded gasoline on a national basis. All this sends signals of overall diminishing availability—and increased price—for leaded gasoline, the primary fuel for the baking industry's delivery fleet of walk-in/route vans.

The price difference currently favoring leaded gasoline is compounded by the better performance characteristics of the leaded fuel. While some gasoline engines can burn both leaded and unleaded gasoline, some gasoline engines in the bakery fleet can only burn leaded fuel. The EPA proposal has made provisions for a "low-lead" fuel; however, in testimony before the agency in August, ABA predicted that should bakers be forced to use even this low-lead fuel, it would cause loss of maximum engine performance and shorter engine life.

In recent years, automobile engines have been altered to decrease the release of pollutants into the atmosphere. The addition of catalytic converters to cars requires these vehicles to burn only unleaded fuel.

For 1985, catalytic converters are being added to gasoline engines on walk-in/route van chassis. Not only does this add to the cost of these chassis, the required use of higher-priced unleaded gasoline suddenly puts diesel on a cost-effective footing for delivery fleets. The price difference, when compounded by the mileage difference between gasoline at 8 to 9 mpg diesel at 14 to 19 mpg, thus substantially shortens the payback period on the higher-priced diesel walk-in/route van chassis.

No wonder the proportion of diesel-powered vehicles in the baker's fleet is in for a change.

Roughly 13% of the baking fleet, 4,895 vehicles **(Table 4),** is powered by fuels other than gasoline or diesel, the ones traditionally termed alternate fuels. This percentage represents no change in share from last year's figures.

All the reasons that favor diesel have combined to make it the baker's alternative fuel choice at the expense of propane, compressed natural gas (CNG) and electricity. The last year has seen no real change in the number of propane and CNG-powered vehicles in the baker's fleet. Additionally, no new programs for implementing these fuels have been started by bakers involved in the ABA census ... nor are any being considered for future involvement.

Table 4: **Fuels used**
number of vehicles powered with

	1984		1983	
Gasoline	21,125	(62%)	25,076	(63%)
Diesel	7,868	(23%)	9,465	(24%)
Propane	4,782	(14%)	5,093	(13%)
CNG	103	(<1%)	97	(<1%)
Electric	10	(<1%)	10	(<1%)

Percentages based on sample reporting vehicle fuel—1984: 33,898; 1983: 39,741. 1984 figures do not include the 2300 walk-in/route vans operated by distributors.

Trends in tires. There seems to be a greater acceptance of radial tires for route trucks, according to the 1984 Bakery Fleet Transportation Survey. Historically, bias ply tires have been used by this type of vehicle; however, radial tires are making real in-roads among bakery fleets. A big difference is seen in new tire purchases reported between last year and this ... and between the purchase practices of different size fleets, as reported by **Table 5.**

Number of	1984	1983
Bias ply tires	31,296	41,581
Radial tires	9,364	3,282
Total	40,660	44,863
Proportion (%)		
Bias ply : **Radial**	77:**23**	91:**9**

Chassis re-life & engine repower. Because aluminum walk-in/route van bodies generally outlive their original chassis, the practice of re-life and repower of fleet vehicles is fairly common among baking companies. To study this, the ABA Fleet Executives Committee added a number of questions about re-life and repower to the 1984 Bakery Fleet Transportation Survey form. **Table 6** details current thinking among baking fleet executives about re-building and repowering their delivery vehicles.

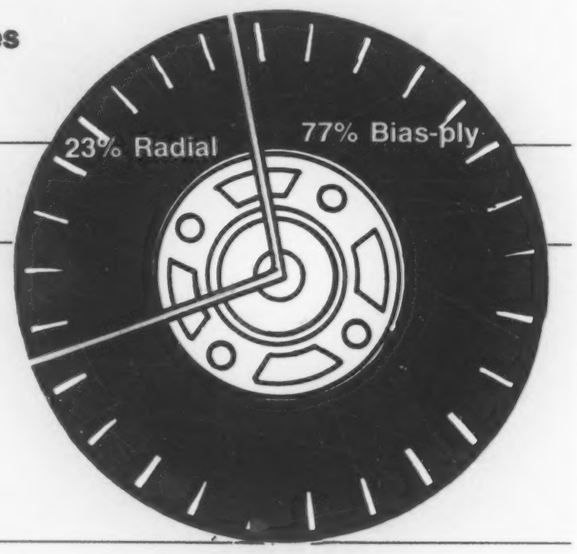
Chassis re-life programs tend to be in-house activities, especially for the larger fleets. Of the 11 companies in the 1984 survey with chassis re-life programs, eight are in-house, and of those eight, five exist among fleets with 500 or more vehicles. A total of 153 chassis have been re-lifed during the past 12 months by this sample of bakers, who noted they have done this for 1,637 chassis altogether during the duration of their chassis re-life programs.

One way to add to fleet capacity is to lengthen delivery vehicles. The fact that well over 1,600 vehicles have been stretched—105 this year alone—testifies to the success of this idea. Fleets of all sizes are involved in stretching programs. Asked about the starting and finishing lengths of such trucks, fleet managers gave a range of 12 to 14 ft as the original length of the truck, with 18 to 19½ ft as the extended length.

Diesel repower of existing vehicles is done by a few fleets **(Table 6).** The majority of these cover walk-in/route vans, with nine companies currently operating diesel repower programs and five indicating that they anticipated development of route truck diesel repower programs in the future. Only one company reported that it repowers medium/heavy duty trucks (straight trucks), while five companies have diesel repower programs for tractors.

Table 5: **Tire purchases**
Bias ply v. radial

Vehicles in fleet	Total fleet	Fleet A 500+	Fleet B 499-151	Fleet C up to 150
Bias ply tires	31,296	27,862	2,998	436
Radial tires	9,364	7,419	1,206	739
Total	40,660			
(Share of total)		(87%)	(10%)	(3%)
Proportion (%)				
Bias ply : **Radial**	77:**23**	79:**21**	71:**29**	37:**63**



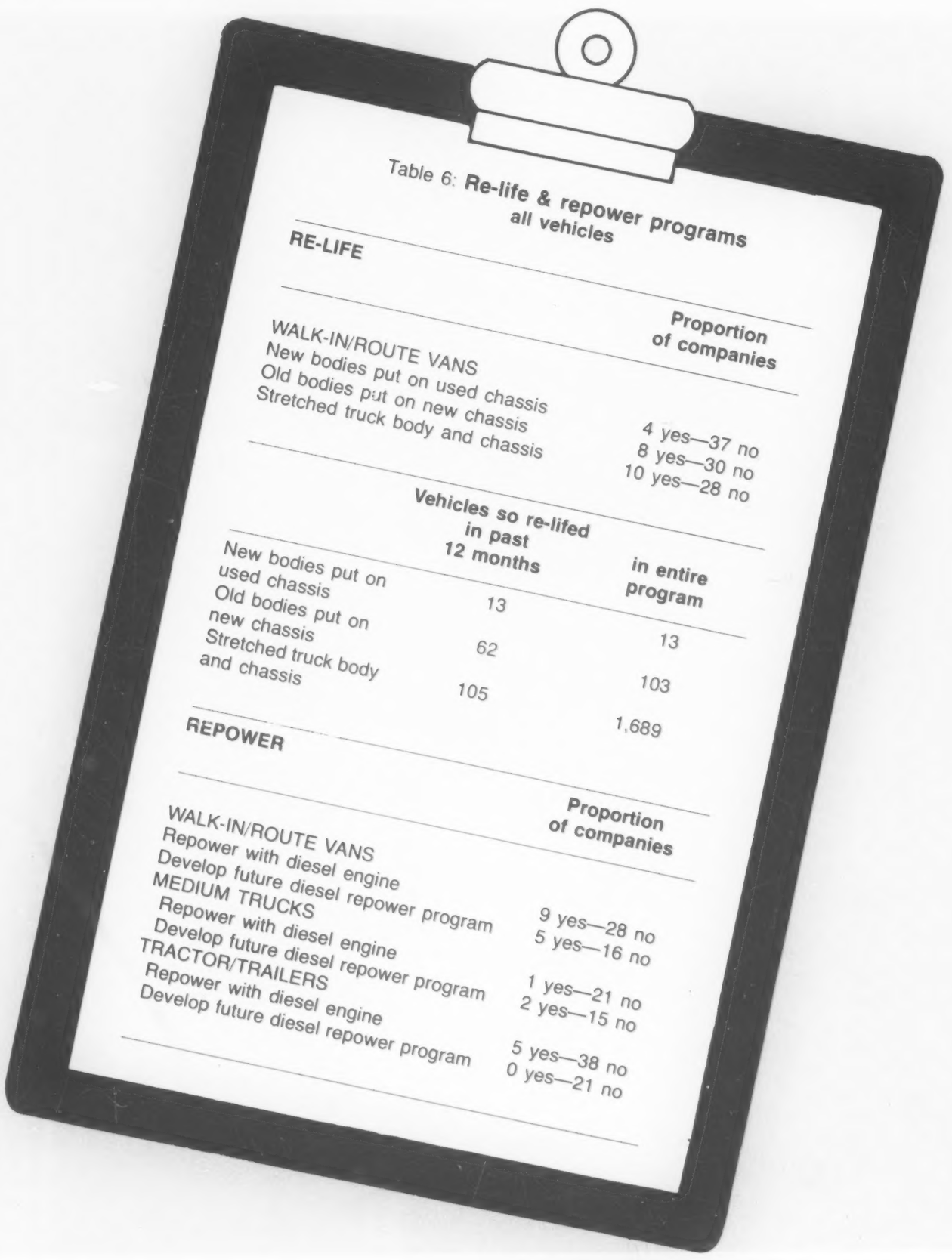


Table 6: **Re-life & repower programs**
all vehicles

RE-LIFE	Proportion of companies
WALK-IN/ROUTE VANS	
New bodies put on used chassis	4 yes—37 no
Old bodies put on new chassis	8 yes—30 no
Stretched truck body and chassis	10 yes—28 no

	Vehicles so re-lifed in past 12 months	in entire program
New bodies put on used chassis	13	13
Old bodies put on new chassis	62	103
Stretched truck body and chassis	105	1,689

REPOWER	Proportion of companies
WALK-IN/ROUTE VANS	
Repower with diesel engine	9 yes—28 no
Develop future diesel repower program	5 yes—16 no
MEDIUM TRUCKS	
Repower with diesel engine	1 yes—21 no
Develop future diesel repower program	2 yes—15 no
TRACTOR/TRAILERS	
Repower with diesel engine	5 yes—38 no
Develop future diesel repower program	0 yes—21 no

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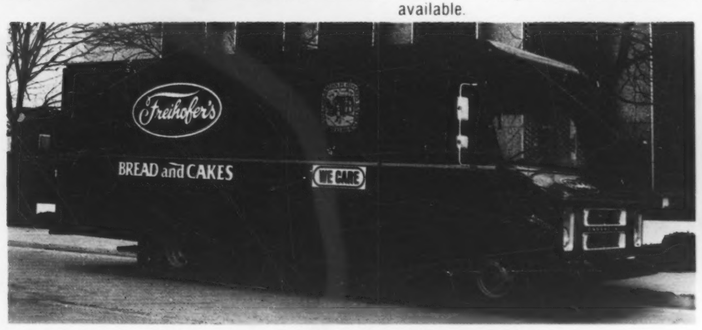
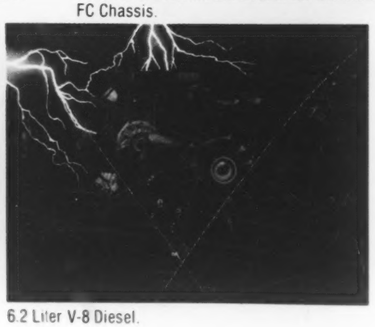


Chevrolet Step-Van 18' Aluminum with more than 25 Special Equipment modifications.



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**Motor Vehicle Manufacturers Association of the United States, Inc.: December 31, 1971 through December 31, 1983, Report FS-20.*

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Deregulation: options & choices. Deregulation of trucking has produced some interesting opportunities for bakers, especially those who can exploit backhaul and inter-company transfer opportunities. Although the number of companies developing these trucking subsidiaries is small, as **Table 7** suggests, they represent a starting trend.

It's the smaller fleets that are establishing or considering creation of trucking subsidiaries: companies with 150 or fewer vehicles account for five of the eight with such subsidiaries, and two of the three considering such options.

Single-source leasing, a new provision under trucking deregulation, is a way of earning money on trucks that would normally stand idle or, alternately, to cover a few days of peak period without having to invest in additional trucks. Although only a few bakers are trying this fleet option, eight are involved with single-source leasing of tractors, while another six are looking at it. Single-source leasing of medium/heavy-duty straight trucks involve five companies, with two more considering the option.

Modernization proceeding. Even in the one year between this study and the last, there are some indications that vehicle modernization is accelerating. **Table 9** shows the differing life expectancies that companies expect for their fleet vehicles. **Table 10** shows a small percentage change in vehicle age, across the entire fleet.

Statistics for miles driven annually per vehicle and the number of stops show similar ranges this year as they did in the first ABA fleet census. In general, the more cargo capacity a truck has, the more miles it covers in a year. On the other hand, the most stops per day are made by the smallest vehicles. Mr. Dorfman laid these seemingly contradictory results before the ABA Fleet Executives Committee at a meeting held just prior to the release of the 1984 study results. The consensus was that bakers tend to use smaller vehicles to service smaller accounts, while delivering larger accounts via larger vehicles.

Table 7: **De-regulation choices affecting fleet options for bakers**

OPTION	Proportion of companies
GENERAL	
Establishing a trucking subsidiary	8 yes—42 no
Considering establishing a trucking subsidiary	3 yes—38 no
WALK-IN/ROUTE TRUCKS	
Operating any routes by independent distributor	12 yes—28 no
Number of trucks operated:	
Total fleet	2,707
Fleet A	2,518
Fleet B	131
Fleet C	58
MEDIUM TRUCKS	
Using contract/common carriage	2 yes—28 no
Carrying exempt merchandise (such as U.S. mail)	0 yes—28 no
Considering carrying exempt merchandise	4 yes—19 no
Single-source leasing	5 yes—23 no
Considering single-source leasing	2 yes—17 no
TRACTORS/TRAILERS	
Using contract/common carriage	14 yes—32 no
Carrying exempt merchandise (such as U.S. mail)	3 yes—41 no
Considering carrying exempt merchandise	6 yes—31 no
Single-source leasing	8 yes—34 no
Considering single-source leasing	6 yes—23 no

Miles covered	1984	1983
Walk-in/route vans		
Under 10,000 lb GVW	17,098	19,645
10,000 to 15,000 lb GVW	16,953	18,564
15,001 to 19,500 lb GVW	21,837	15,582
Medium trucks (transports)		
19,501 to 26,000 lb GVW	24,374	22,900
26,001 to 33,000 lb GVW	6,514	32,460
Heavy trucks		
Over 33,000 lb GVW	99,400	111,394
Tractors		
2-axle	71,352	78,198
3-axle	92,017	79,845

Stops per day	1984	1983
Walk-in/route vans		
Under 10,000 lb GVW	33	31
10,000 to 15,000 lb GVW	35	26
15,001 to 19,500 lb GVW	19	28
Medium trucks (transports)		
19,501 to 26,000 lb GVW	12	11
26,001 to 33,000 lb GVW	6	15
Heavy trucks		
Over 33,000 lb GVW	6	10
Tractors		
2-axle	7	7
3-axle	5	4

Highway driving	1984	1983
Walk-in/route vans		
Under 10,000 lb GVW	20%	40%
10,000 to 15,000 lb GVW	20%	44%
15,001 to 19,500 lb GVW	43%	62%
Medium trucks (transports)		
19,501 to 26,000 lb GVW	31%	57%
26,001 to 33,000 lb GVW	60%	38%
Heavy trucks		
Over 33,000 lb GVW	93%	71%
Tractors		
2-axle	78%	85%
3-axle	82%	83%

Overall in 1984, top speeds for fleet vehicles were somewhat lower than the previous year. In 1983, every vehicle category was rated in the narrow range of 54 to 58 mph (weighted average). The only exception were the heaviest of the walk-in/route vans, those weighing 15,001 to 19,500

Table 8: **Trailers in bakers' fleets**

Type	Number	(Share)
Single-axle	768	(16%)
Tandem-axle	3,667	(76%)
Refrigerated	315	(7%)
Dry bulk	52	(1%)
Total	**4,802**	

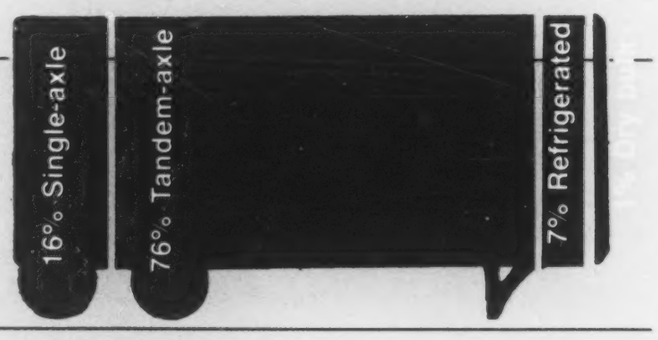


Table 9: **Average vehicle life expectancy years (weighted averages)**

	Under 10	10-15 yr	16-19 yr	20 or more
Walk-in/route van				
chassis	10%	43%	39%	8%
bodies	—	7%	62%	32%
	Under 5	**5-10 yr**	**11-15 yr**	**15 or more**
Medium trucks	3%	42%	29%	27%
Trailers	31%	40%	23%	6%
	Under 5	**5-8 yr**	**9-12 yr**	**12 or more**
Tractors	7%	7%	65%	22%

GVW, which averaged 44 mph in top speed. In contrast, the range of speeds this year was:

- Walk-in/route vans: 47 to 54 mph
- Medium/heavy duty straight trucks: 46 to 56 mph
- Tractors: 55 to 57 mph.

The analysis of where these vehicles are driven show very different results this year than last. One interpretation is that the heavier walk-in/route vans, transports and tractors are being increasingly committed to large-order deliveries. The wide variance in these weighted averages, however, clouds such speculation.

Taxes & tractor weights. Besides creating a portrait of the baking industry's fleet, the 1984 Bakery Fleet Transportation Survey also gives the association a statistical tool to help build lobbying positions on fleet issues. For example, a key survey question, new this year, asked about the actual weights at which tractors normally operate.

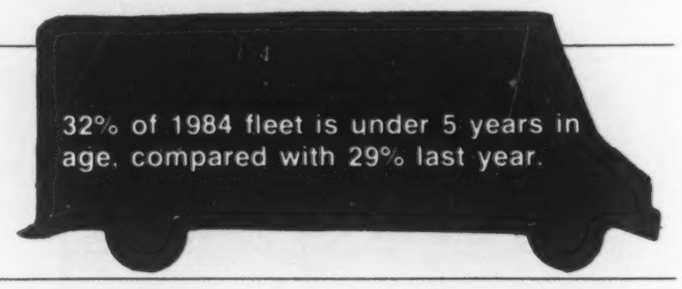
Specifically, respondents were asked what was the approximate maximum gross weight at which they operated their tractors. The question asked for actual vehicle weight, including fully loaded trailor, rather than registry weight for tax purposes:

Gross vehicle weight (lb)	2-axle Tractors	3-axle Tractors
Total fleet	52,407	72,171
Fleet A (500+ vehicles)	52,667	70,214
Fleet B (151-499 vehicles)	52,774	75,278
Fleet C (up to 150 vehicles)	49,341	75,309

Proposed changes in the way trucks are taxed could prove highly inequitable to bakers. Tractors with capacity ratings of 55,000 lb gross combination weight (GCW) and above would be federally taxed—required to pay a $210/truck "user's fee"—while those below that threshold would not be taxed. While a basic assumption by the Internal Revenue Service is that the weight of 2-axle tractors with trailers rises above the 55,000-lb-GCW threshold, the 1984 ABA fleet study reports that customary usage of 2-axle tractors by bakers is in the range of 52,000 lb GCW. Mr. Dorfman said that the association will be using this fact in lobbying the IRS for exemptions from these truck taxes for bakers. ■

Table 10: **Current vehicle age**

	1984		1983	
Under 5 years	10,985	(32%)	12,860	(29%)
5-10 years	11,046	(32%)	14,563	(33%)
10-15 years	8,609	(25%)	11,798	(26%)
Over 15 years	3,665	(11%)	5,489	(12%)



Percentages based on sample reporting vehicle age—1984: 34,295; 1983: 44,710. (Includes trucks and trailers, but does not include automobiles.)

INTERNATIONAL BAKING INDUSTRY EXPOSITION 1985

NOVEMBER 8-12
LAS VEGAS, NEVADA

TRANSPO at EXPO

Transportation will get featured billing next fall at the largest baking exposition in the western hemisphere. When the International Baking Industry Exposition opens in Las Vegas on November 8, 1985, it will devote an entire hall to fleet and transportation-oriented exhibitors. Additionally, "Transpo '85," an educational seminar covering current topics in fleet management is being planned by the Fleet Executives Committee of the American Bakers Association.

Baking Expo '85, sponsored jointly by the Bakery Equipment Manufacturers Association and ABA, takes place once every four years. In all, the show will take up more than 350,000 net sq ft—the equivalent of 4¼ football fields of space. World innovations in baking will be on display, as more than 200 exhibitors exhibit the latest equipment, ingredient, material handling ... and transportation ideas.

"Transpo '85" will take place on the mornings of November 8 through 10, with sessions scheduled prior to the daily morning opening of Expo exhibits. This will allow "Transpo '85" attendees and speakers to take full advantage of both the multiple-session seminar programs and the show hall exhibits.

Expo pre-registration and hotel information has just been released by the show management. Contact Janie C. Kellam, Secretary-Treasurer, IBIE, 1111 14th St. N.W., Suite 300, Washington, D.C. 20005; telephone: 202/296-5800; telex: 25-4073 SBA. ■

Vehicle type and operating statistics for 1984 Bakery Fleet Transportation Survey

Number of companies	51	12	12	27
VEHICLES operated				
Walk-in/route vans	32,165	29,252	2,081	832
Medium trucks (straight trucks)	703	327	340	36
Tractors	3,330	2,708	281	341
Automobiles	3,359	2,734	325	300
Trailers	4,802	3,620	712	470
Vehicles (without trailers)	39,557	35,021	3,027	1,509
Vehicles (with trailers)	44,359	38,641	3,739	1,979
AUTOMOBILES operated				
Total	3,359	2,734	325	300
Company-owned	2,410 (72%)	1,888 (69%)	249 (76%)	273 (91%)
Leased	949 (28%)	846 (31%)	76 (24%)	27 (9%)
FUEL PURCHASES for calendar 1983				
Gal of gasoline	35,448,196	29,089,250	4,426,842	1,932,104
Gal of diesel fuel	50,071,550	39,659,011	3,980,979	6,431,550
Gal of propane	15,061,583	14,308,336	555,781	187,466
Gal of CNG	155,000*			

*One company only

Total	32,165	29,252	2,081	832
Under 10,000 lb GVW				
Total	23,444 (73%)	21,710	1,361	373
Company-owned	17,926	16,272	1,291	363
Leased	5,518	5,438	70	10
10,000-15,000 lb GVW				
Total	8,466 (26%)	7,492	522	452
Company-owned	5,469	4,560	552	378
Leased	2,997	2,932	—	65
15,001-19,500 lb GVW				
Total	255 (1%)	50	198	7
Company-owned	255	50	198	7
Leased	—	—	—	—
Number of gasoline engines				
<10,000 lb GVW	16,904	15,370	1,225	309
10,000-15,000 lb GVW	3,611	2,858	394	359
15-19,500 lb GVW	153	—	146	7
Total	20,688 (69%)	18,228	1,756	657
Number of diesel engines				
<10,000 lb GVW	1,820	1,746	30	44
10,000-15,000 lb GVW	2,498	2,334	119	45
15,001-19,500 lb GVW	61	—	11	0
Total	4,379 (15%)	4,080	160	89

Number of propane engines				
TOTAL				
<10,000 lb GVW	4,607	4,481	106	20
10,000-15,000 lb GVW	57	—	9	48
15,001-19,500 lb GVW	41	—	41	—
Total	4,705 (16%)	4,481	156	68
CONVERSION UNITS within total propane engines above				
<10,000 lb GVW	4,564	4,481	63	20
10,000-15,000 lb GVW	57	—	9	48
15,001-19,500 lb GVW	41	—	41	—
Number of CNG engines				
<10,000 lb GVW	103	103	—	—
10,000-15,000 lb GVW	—	—	—	—
15,001-19,500 lb GVW	—	—	—	—
Total	103 (<1%)	103	—	—
Electrically-powered engines				
<10,000 lb GVW	10	10	—	—
10,000-15,000 lb GVW	—	—	—	—
15,001-19,500 lb GVW	—	—	—	—
Total	10 (<1%)	10	—	—
Walk-in/route van body length				
<12 feet				
<10,000 lb GVW	2,022	1,861	107	54
10,000-15,000 lb GVW	102	102	—	—
15,001-19,500 lb GVW	—	—	—	—
Total	2,124 (7%)	1,963	107	54
12 feet				
<10,000 lb GVW	2,935	2,763	164	35
10,000-15,000 lb GVW	51	8	10	33
15,001-19,500 lb GVW	25	—	25	—
Total	3,011 (10%)	2,771	199	68
13-14 feet				
<10,000 lb GVW	13,972	13,231	655	86
10,000-15,000 lb GVW	4,480	4,222	22	236
15,001-19,500 lb GVW	—	—	—	—
Total	18,452 (62%)	17,453	677	332
15-16 feet				
<10,000 lb GVW	4,475	3,879	420	176
10,000-15,000 lb GVW	1,203	566	466	171
15,001-19,500 lb GVW	7	—	—	7
Total	5,685 (19%)	4,445	886	354
Over 16 feet				
<10,000 lb GVW	40	3	15	22
10,000-15,000 lb GVW	330	294	24	12
15,001-19,500 lb GVW	173	—	173	—
Total	543 (2%)	297	212	34
New route truck body purchases planned in next 12 months				
<12 feet	153 (16%)	153	—	—
12 feet	—	—	—	—
13-14 feet	58 (6%)	38	20	—
15-16 feet	488 (52%)	420	32	36
>16 feet	238 (25%)	180	44	14
Total	937	791	96	50

Miles per vehicle per year (weighted average)				
<10,000 lb GVW	17,098	17,430	12,421	14,758
10,000-15,000 lb GVW	16,953	17,033	16,580	15,065
15,001-19,500 lb GVW	21,837	25,000	10,628	48,833
Stops per day per vehicle (weighted average)				
<10,000 lb GVW	32.5	32.9	21.1	30.7
10,000-15,000 lb GVW	35.0	36.4	26.3	30.9
15,001-19,500 lb GVW	19.4	—	19.5	14.7
Average top speed (weighted average)				
<10,000 lb GVW	47	47	47	47
10,000-15,000 lb GVW	48	47	59	55
15,001-19,500 lb GVW	54	55	38	51
Percentage of driving done on interstate or other major highways (weighted average)				
<10,000 lb GVW	20	19	20	20
10,000-15,000 lb GVW	20	17	49	47
15,001-19,500 lb GVW	43	—	47	53
Tire purchases				
Bias-ply tires purchased for walk-in/route vans during the past 12 months	31,296 (77%)	27,862	2,998	436
Radial tires purchased for walk-in/route vans during the past 12 months	9,364 (23%)	7,419	1,206	739
Life expectancy for walk-in/van chassis (weighted average)				
<10 years	9.6%	10.3%	—	8.2%
10-15 years	43.2%	44.2%	29.2%	42.8%
16-19 years	39.4%	40.2%	37.6%	16.6%
20 years or more	7.7%	5.3%	30.8%	32.5%
Life expectancy for truck bodies (weighted average)				
<10 years	—	—	—	—
10-15 years	6.9%	4.7%	31.2%	18.6%
16-19 years	61.5%	66.1%	11.5%	36.5%
20 years or more	31.5%	29.2%	57.3%	44.8%
New chassis purchases planned in next 12 months				
<10,000 lb GVW	559 (55%)	488	49	22
10,000-15,000 lb GVW	451 (45%)	369	47	44
15,001-19,500 lb GVW	—	—	—	—
Engines powering these new chassis				
GASOLINE				
<10,000 lb GVW	391	358	19	14
10,000-15,000 lb GVW	218	150	32	36
15,001-19,500 lb GVW	—	—	—	—
DIESEL				
<10,000 lb GVW	168	130	32	8
10,000-15,000 lb GVW	233	210	15	8
15,001-19,500 lb GVW	—	—	—	—
PROPANE	none			
CNG	none			

Total	703	475	340	36
19,501-26,000 lb GVW				
Total	475	302	162	11
Company-owned	462	289	162	11
Leased	13	13	—	—
26,001-33,000 lb GVW				
Total	208	25	171	12
Company-owned	190	9	171	10
Leased	18	16	—	2
Over 33,000 lb GVW				
Total	20	—	7	13
Company-owned	20	—	7	13
Leased	—	—	—	—
Number of gasoline engines				
19,501-26,000 lb GVW	343	188	148	7
26,001-33,000 lb GVW	94	9	82	3
Over 33,000 lb GVW	4	—	—	4
Total	441 (63%)	197	230	14
Number of diesel engines				
19,501-26,000 lb GVW	125	114	8	3
26,001-33,000 lb GVW	38	16	13	9
Over 33,000 lb GVW	16	—	7	9
Total	179 (25%)	130	28	21
Number of propane engines				
TOTAL				
19,501-26,000 lb GVW	7	—	6	1
26,001-33,000 lb GVW	76	—	76	—
Over 33,000 lb GVW	—	—	—	—
Total	83 (12%)	—	82	1
CONVERSION UNITS within total propane engines above				
19,501-26,000 lb GVW	1	—	—	1
26,001-33,000 lb GVW	76	—	76	—
Over 33,000 lb GVW	—	—	—	—
Number CNG engines none				
Miles per vehicle per year (weighted average)				
19,501-26,000 lb GVW	24,306	27,580	18,921	13,727
26,001-33,000 lb GVW	30,362	47,516	27,590	33,500
Over 33,000 lb GVW	99,400	—	108,000	94,769
Stops per day per vehicle (weighted average)				
19,501-26,000 lb GVW	12.1	13.8	8.8	15
26,001-33,000 lb GVW	5.5	6	5	5
Over 33,000 lb GVW	6	—	4	7
Average top speed (weighted average)				
19,501-26,000 lb GVW	46	54	30	46
26,001-33,000 lb GVW	51	50	55	52
Over 33,000 lb GVW	56	—	55	56
Percentage of driving done on interstate or other major highways (weighted average)				
19,501-26,000 lb GVW	31	45	5.7	33
26,001-33,000 lb GVW	60	50	90	60
Over 33,000 lb GVW	93	—	95	92

Life expectancy for vehicles (weighted average)				
<5 years	3%	6.5%	—	—
5-10 years	41.8%	40%	47.3%	5.6%
11-15 years	28.7%	49.5%	5.6%	58.3%
Over 15 years	26.5%	4%	47.1%	36.1%
New truck purchases planned in next 12 months				
19,501-26,000 lb GVW	13	12	1	—
26,001-33,000 lb GVW	—	—	—	—
Over 33,000 lb GVW	2	1	1	—
Engines powering these new trucks				
GASOLINE				
19,501-26,000 lb GVW	1	—	1	—
26,001-33,000 lb GVW	—	—	—	—
Over 33,000 lb GVW	1	—	1	—
DIESEL				
19,501-26,000 lb GVW	12	12	—	—
26,001-33,000 lb GVW	—	—	—	—
Over 33,000 lb GVW	1	1	—	—
PROPANE	none			
CNG	none			

Total tractors	3,330	2,708	281	341
Total trailers	4,802	3,620	712	470
2-axle tractors				
Total	2,694	2,318	190	186
Company-owned	1,837	1,583	150	104
Leased	857	735	40	82
3-axle tractors				
Total	636	390	91	155
Company-owned	259	169	32	58
Leased	377	221	59	97
Trailers				
Total	4,802	3,620	712	470
Company-owned	3,690	2,784	561	345
Leased	1,112	836	151	125
Gross vehicle weight				
Approximate maximum gross weight at which tractors normally operate: actual weight, including fully-loaded trailer, rather than registry weight (weighted average)				
2-axle tractors	52,407	52,667	52,774	49,341
3-axle tractors	72,171	70,214	75,278	75,309
Number of gasoline engines				
2-axle tractors	16	5	5	6
3-axle tractors	—	—	—	—
Number of diesel engines				
2-axle tractors	2,674	2,309	184	180
3-axle tractors	603	390	91	155

Number of propane engines				
TOTAL				
2-axle tractors	4	4	—	—
3-axle tractors	—	—	—	—
CONVERSION UNITS within total propane engines above	none			
Miles per vehicle per year (weighted average)				
2-axle tractors	71,352	73,474	45,839	71,163
3-axle tractors	92,017	90,389	72,009	107,832
Stops per day per vehicle (weighted average)				
2-axle tractors	7	4.8	6	12
3-axle tractors	5.1	5.3	3	4
Average top speed (weighted average)				
2-axle tractors	55	56	45	54
3-axle tractors	57	57	53	58
Percentage of driving done on interstate or other major highways (weighted average)				
2-axle tractors	78	78	71	77
3-axle tractors	82	86	72	77
Life expectancy for tractors (weighted average)				
<5 years	6.7%	4.0%	—	30.8%
5-8 years	6.9%	0.4%	25.7%	42.5%
9-12 years	64.7%	74.8%	25.2%	18.5%
Over 12 years	21.8%	21.3%	49.1%	8.2%
New tractor and/or trailer purchases planned in next 12 months				
2-axle tractors	165	125	15	25
3-axle tractors	38	32	—	6
Trailers	220	147	33	40
Engines powering these new trucks				
GASOLINE				
2-axle tractors	none			
3-axle tractors	none			
DIESEL				
2-axle tractors	165	125	15	25
3-axle tractors	38	32	—	6
Number of trailers				
Single-axle	768	593	64	111
Tandem-axle	3,667	2,816	640	211
Refrigerated	315	191	2	122
Dry bulk	52	20	6	26
Age of trailers				
<5 years	1,240	957	108	175
5-10 years	1,581	938	462	181
11-15 years	924	741	89	94
Over 15 years	221	148	53	20
Unspecified		836		